



i2B Limited

eSRM Buyers User Guide for Weir Minerals

Documentation for:
WEIR MINERALS

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Introduction

The purpose of the eSRM (electronic Supplier Relationship Management) system is to:

- Provide a better and more effective means of communication between Vendors and Weir Minerals.
- Reduce administration cost by eliminating the need for paper copies of Orders, Schedules, Shipping confirmations and Contracts etc.
- To provide both the **BUYER** and **VENDOR** with more detailed information than normally available.

A Weir Minerals Buyer using eSRM you will have access to

- View Purchase Orders across vendors.
- View Documents that have Changed/New
- View / Update / Accept Change requests
- Search
- View Contacts
- View Vendor Tools & Utilities
- View Vendor Details



Figure 1.0

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The Log on screen

The LOGIN page is the first screen you will be presented with upon accessing the eSRM system.

From this page you have the facilities to:

- VIEW Weir Minerals Terms and Conditions of using the site, the terms for viewing and accepting purchasing documents is available under the "Terms" button under the login details.
- A facility to contact Support with any login problems is available (via an email link).
- There is also the option to change the user interface language between various languages from the flags at the bottom left hand corner of each page.

To continue, enter your **USERNAME, ID** and **PASSWORD** (see **Figure 2.0**) and then click on "Accept" to continue. Accept means that the user is accepting the terms and conditions relating to both Purchase Orders and remote access to the system.

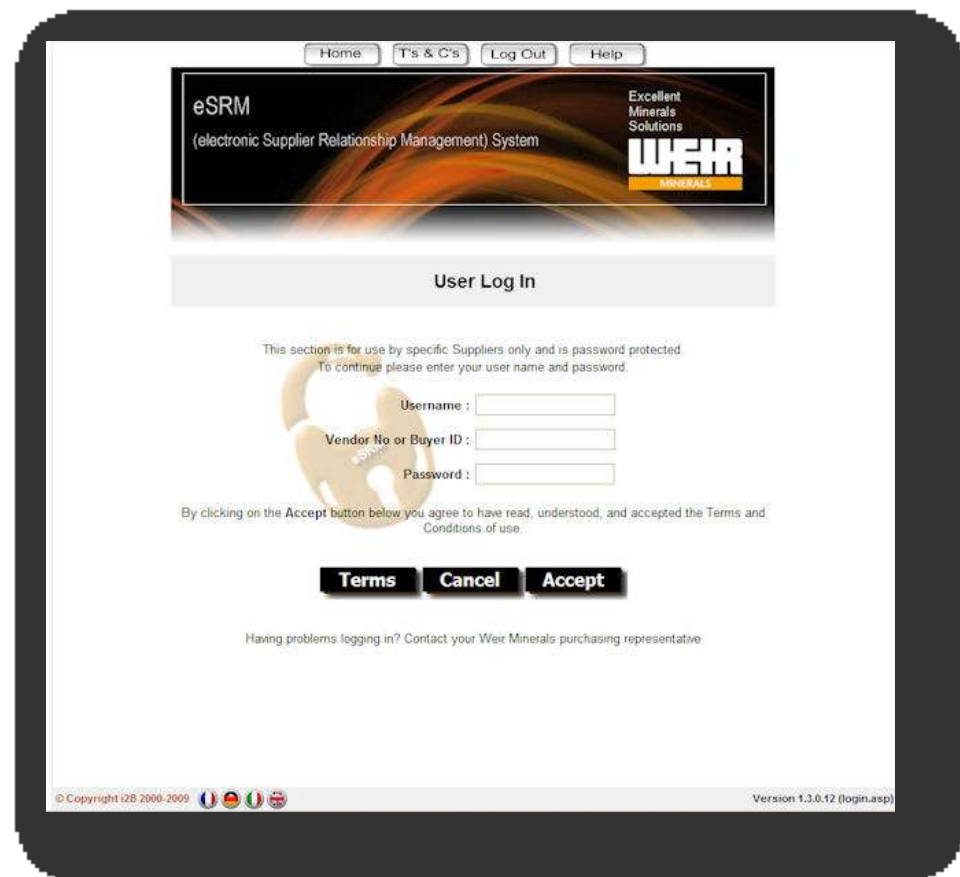


Figure 2.0

Buyer Search Screen

From this screen the Buyer will be able to (see **Figure 3.0** for example menu screen):

Search the system by vendor y selecting "Vendor", this will enable the user to view the system how a vendor would see eSRM.

Or

To view the system as a buyer enables the user to view the system across vendors, this can be done by selecting the "Buyer" button.

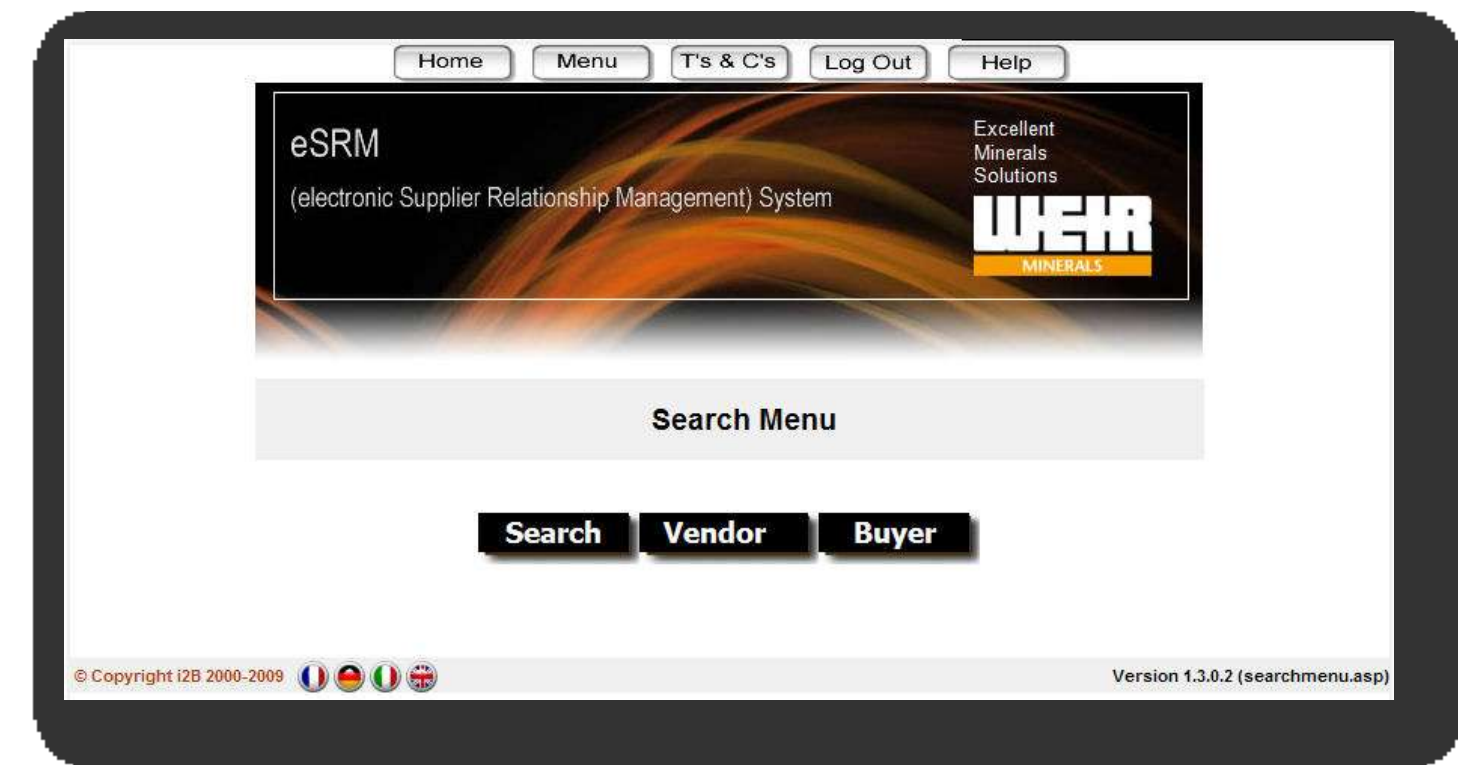


Figure 3.0

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Material Search

Material Search

This option allows the Buyer to search through all documents for a specific contract / order number, Vendor Part number or a Weir Minerals part number. A search can be filtered on any of the following (see **Figure 4.0** for an example):

Purchase Order / Purchase Contract

Vendor Deliveries

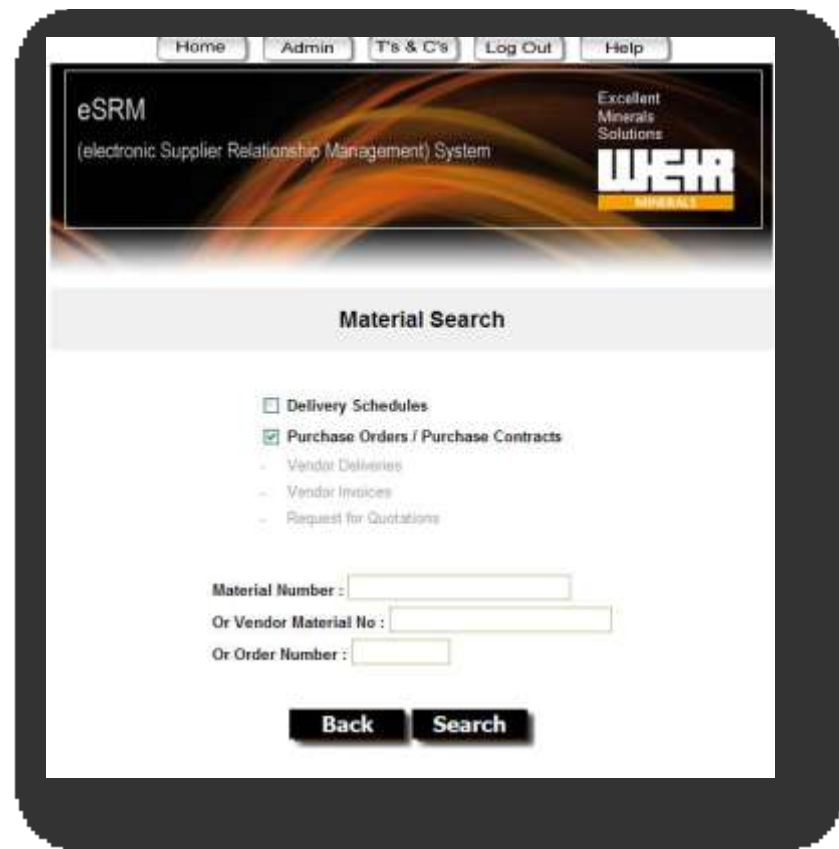


Figure 4.0

Search can be completed using one or more tick boxes.

FIELD	DESCRIPTION
MATERIAL NUMBER	Weir Minerals material number.
VENDOR MATERIAL NO	Supplier material number (if stored within Weir Minerals system)
ORDER NUMBER	Weir Minerals Purchase Order Number or Purchase Contract Number.

Vendor Search

Vendor Search

This option allows the Buyer to search through all documents for a specific Vendor (see **Figure 5.0** for an example):

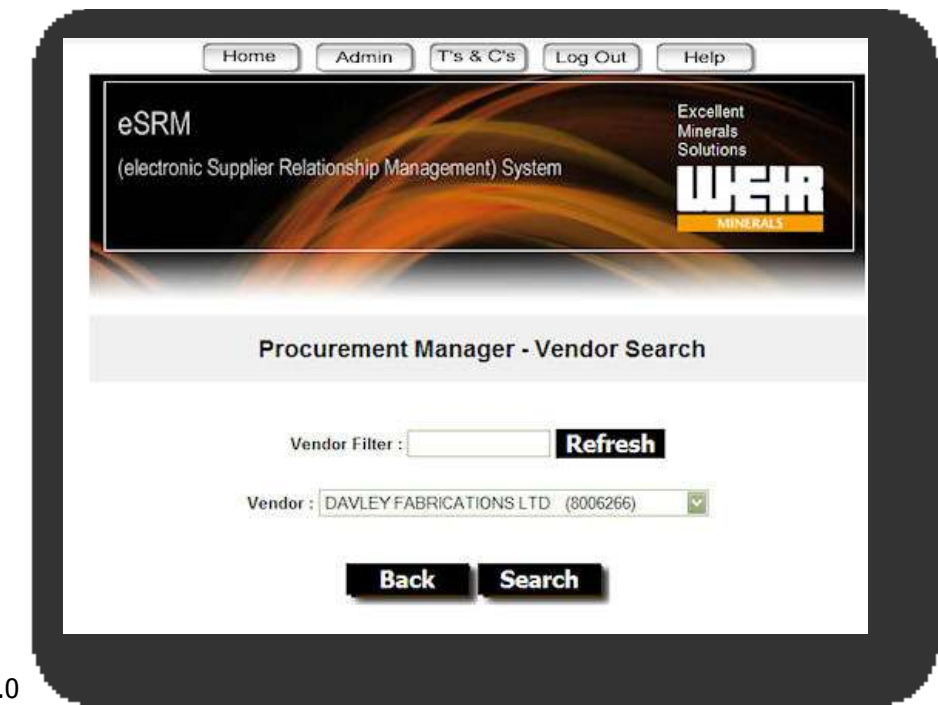


Figure 5.0

FIELD	DESCRIPTION
VENDOR FILTER	Enter either part of the Vendor Number or Vendor Name into here and click "Refresh" to activate the filter. For example "SMITH" entered into the filter may return "Smiths Ltd" or "A Smith & Son Ltd".
VENDOR	A list of Vendors sorted by Name with their specific Vendor Number in brackets. List displayed will be dependent on the Filter applied.
BACK	This will take the user back to the search screen.
SEARCH	Accepts the Vendor selected on the Vendor drop down box.

Press "Back" to return to the Buyers initial menu, press "Search" to select the Vendor highlighted from the dropdown list. From this point on all orders / contracts will be filtered by this Vendor. This view will reflect the view the specific Vendor would see logging into the eSRM System.

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Vendor / Buyer Menu Screen

Main Menu

From this screen you will be able to access information relating to the previously selected Vendor.

To change the Vendor previously selected press the "Change" option to go back to the previous selection screen(s).

Greyed out options are currently not installed or enabled for your user ID. (see **Figure 6.0** for example menu screen).



Figure 6.0

Accept / Decline an Contract / Order

Main Menu > Purchase Contracts / Purchase Orders / Changed & New Documents > Document Number

Drilldown > Accept

If the user is specified as an "Approver" then you will be given the option to accept if:

- The order is new
- The order has changed
- The order has been viewed previously but has yet to be accepted
- The order has been viewed but was previously declined

The user will be given the options of (see **Figure 7.0**):

- Declining the contract / order
- Accepting the contract / order
- Accepting the contract / order with comments



Figure 7.0

Declining the contract / order

Main Menu > Purchase Contracts / Purchase Orders / Changed & New Documents > Document Number Drilldown > Decline

If the user wishes to decline the contract / order, by clicking on the “Decline Order” option, the status of the contract / order will be set to “Declined”. The buyer will be informed automatically via email that the contract / order has been declined, by whom and when.

The contract / order remains at declined until the user goes into the accept routine again.

Accepting the contract / order

If the user wishes to accept the contract / order, by clicking on the “Accept Order” option, the status of the contract / order will be set to “Accepted”. The buyer will be informed automatically via email that the contract / order has been accepted, by whom and when.

The contract / order will be at accepted status and will remain that way until the contract / order changes then the user will be given a fresh option of re-accepting or declining.

Accepting the contract / order with Comments

Main Menu > Purchase Contracts / Purchase Orders / Changed & New Documents > Document Number Drilldown > Accept with Comments

If the user wishes to accept the contract / order but send associated comments, by clicking on the “Accept Order with comments” option, the status of the contract / order will be set to “Accepted”.

A second screen will appear (see **Figure 7.1** for an example) to allow the user to enter the required comments to be sent back to the buyer.

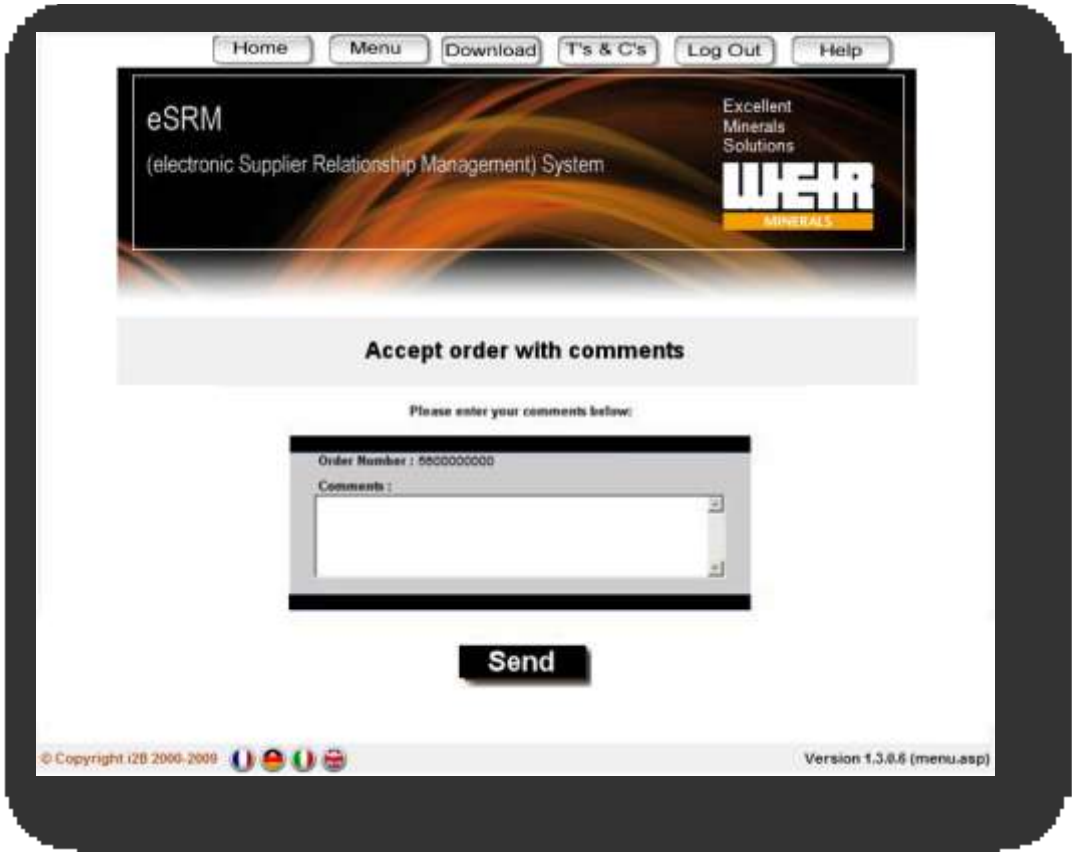


Figure 7.1

Once the user has clicked on “Send” the buyer will be informed automatically via email that the contract / order has been accepted (with the associated comments), by whom and when. Again, the contract / order will be at accepted status and will remain that way until the contract / order changes then the user will be given a fresh option of re-accepting or declining.

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Purchase Orders

Main Menu > Purchase Orders/All your documents

From the main menu screen when the Buyer selects to view Purchase orders, displayed will be the purchase order number, the date the order was placed, delivery dates and who placed the order (see **Figure 8.0** for an example).

Click on the "Back" button to return to the Main Menu.

The list will be filtered by the Buyer ID previously selected (blank if no previous Buyer ID selected from any other menu option). A dropdown list will be available to allow the user to select another Buyer ID from their group, or they will be able to select the full "Team". Pressing "Refresh" will refresh the list based on the selected purchasing group.

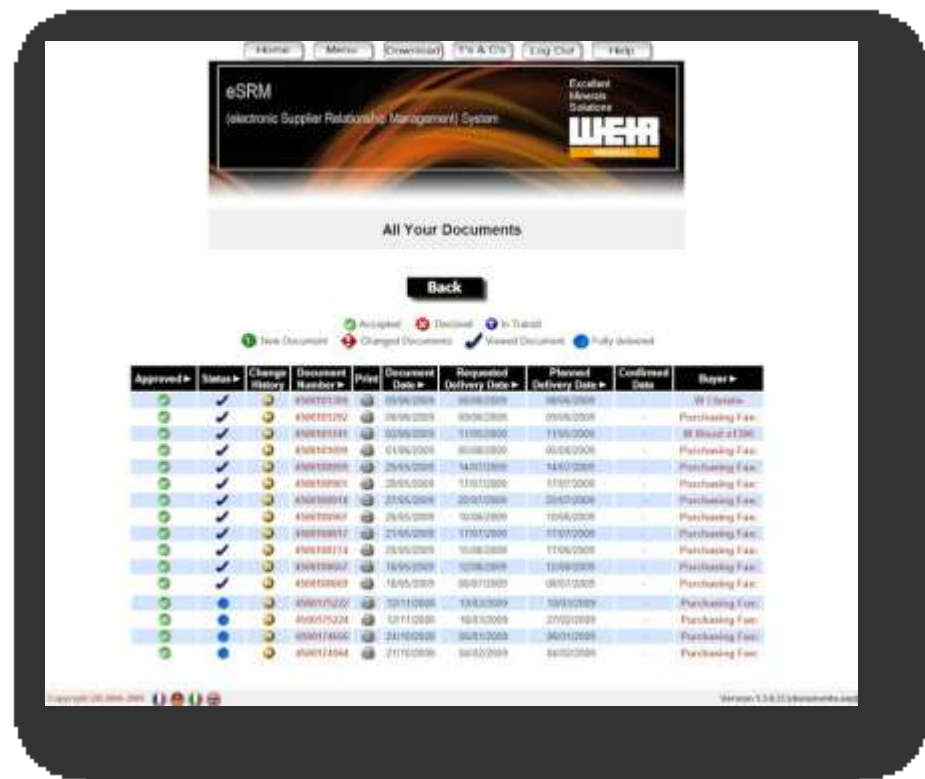


Figure 8.0

FIELD	DESCRIPTION
APPROVED?	<p>This is when a document has been accepted (a document can only be accepted by a user with "APPROVER" status). When the document is at status "Changed" it can still be at status approved - this means that a previously approved document has recently changed. The user (if they are an "APPROVER") has the option to go in and decline the order if they do not wish to accept the changes made.</p> <p>Declined - This is when a document has been declined. When the document is at status "Changed" it can still be at status declined. A document can be approved after they have declined the order.</p>
STATUS	<p>Whether the Purchase Order has been viewed, or is changed, or is new. A facility to sort by this field will be displayed. Only a person with "VIEWER" privileges can change the status of the order.</p>
CHANGE HISTORY	<p>Drilldown to view Change History for Purchase Order showing (by date) summary of each change picked up by eSRM. Details shown will be Change Date, Comments (summary of change), line number (specific purchasing document line number if relevant), viewed flag (has the change been viewed by the supplier), last viewed by flag (supplier login id who last view the change / document), last viewed date (latest date of the supplier login id who viewed change).</p>
DOCUMENT NUMBER	<p>Drilldown to view the Purchase Order. Document number will be the Purchase Order / Grouped Purchase Order reference. A facility to sort by this field will be displayed.</p>
PRINT	<p>Facility to print Purchase Order. Document will be displayed on screen as if printed manually and sent in the post.</p>
DOCUMENT DATE	<p>Document date is the document entry date.</p>
REQUESTED DATE	<p>Original Purchase Order Delivery Date requested</p>
PLANNED DATE	<p>Current Planned Delivery date of the order</p>
CONFIRMED DATE	<p>Confirmed Delivery date of goods.</p>
BUYER	<p>Buyer responsible for the Purchase Contract. Drilldown to view Buyer details. Details will be shown as Telephone number, Fax number, Email Address and responsibilities. Digital photo / image of the buyer will be displayed stored.</p>

Purchase Order Display

Main Menu > Purchase Orders > Document Number Drilldown

The selected order can be accessed via the Purchase Orders drilldown on the document number and will be displayed as shown below (see **Figure 9.0** for an example).

The screen shot shows the Purchase order details; the fields shown in **blue** have further information behind them.

Standard Purchase Order Details			
Weir Minerals Europe Limited Halifax Road, Todmorden Lancashire, OL14 5RT England			Telephone: +44 (0) 1706 814251 Fax: +44 (0) 1706 815350 http://www.weirminerals.com
<div style="text-align: right; font-size: small;"> Excellent Minerals Solutions </div>			
Purchase Order Number	Date	Purchase Order	
4500000000	08/07/2009		
Order On		Ship to	
Company Limited Industrial Estate Halifax HXX XXX GB		Weir Minerals Limited Halifax Road Todmorden Lancashire OL14 5RT	
Contact	Telephone	Unloading point	Our reference
Kash Ali	To be updated		
Supplier No.	Our Tax Number	Supplier contact	Internal reference
8000000	GB183592731		
Terms & Conditions			
Delivery date: 22/07/2009		Terms of deliv.: GIP	
Terms of pay.: Due 30 days month end		Currency: GBP	
<p>Please supply the undermentioned goods and/or services in accordance with Weir Minerals Europe Limited standard purchasing terms and conditions as previously supplied (here). The delivery date on this purchase order is the date when goods should arrive at the Ship-to point indicated.</p> <p>Suppliers will not manufacture or supply, otherwise than pursuant to an Order from ourselves, any parts or components for the incorporation or use in Weir Minerals pumps or equipment of our design. You will not, except for the purpose of manufacturing or supplying any such parts or components to our Orders directly or indirectly, at any time use, permit to be used, communicate to any other party or turn to account any of the designs, drawings, specifications, manufacturing details and know-how disclosed or provided by us to you.</p> <p>All Fabrications and other bought in parts which weight more than 25KG should be clearly marked with it's actual weight in a readily readable, permanent form (e.g. by weld deposit or etching). Any lifting points where appropriate should also be clearly marked. None complying goods will be rejected from our works.</p>			
Item	Material	Description	Order Quantity
Delivery Date			Unit
10	P000000	COVER SET	2 EA
22/07/2009			Unit Price
			142.20
			Line Total
			284.40
EACH SET IS TO BE INDIVIDUALLY WRAPPED & MARKED WITH OUR PART NUMBER.			
Authorised by:		Total net value excluding tax	
		GBP 284.40	
<div style="display: flex; justify-content: space-around; margin: 0 auto; width: 80%;"> <div style="border: 1px solid black; padding: 5px 10px; background-color: #f0f0f0;">Accept</div> <div style="border: 1px solid black; padding: 5px 10px; background-color: #f0f0f0;">Back</div> <div style="border: 1px solid black; padding: 5px 10px; background-color: #f0f0f0;">Print</div> </div>			

FIELD	DESCRIPTION
VENDOR NO	Displays the Vendors specific details; displaying their name, contact details, e-mail & web address (see later in this user guide for an example).
BACK	Takes you back to the Purchase Orders list.
ACCEPT	Available if you are a user with "APPROVER" status. See following sections on Approving / Declining Contracts / Orders.
PRINT	Generates a separate screen with the Order in printer friendly version.

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Figure 11.0

Documents that have changed / New

Main Menu > Documents Changed / New

From the main menu screen when the Buyer selects to view Documents Changed / New, displayed will be the Contract / Order number, the date the contract / order was placed and who placed the contract / order (see **Figure 12.0** for an example). This screen functions exactly the same as “Purchase Orders”, including Contracts but just displays contracts / orders that are new or have changed.

Click on the “Back” button to return to the Main Menu.

The list will be filtered by the Buyer ID previously selected (blank if no previous Buyer ID selected from any other menu option). A dropdown list will be available to allow the user to select another Buyer ID from their group, or they will be able to select the full “Team”. Pressing “Refresh” will refresh the list based on the selected purchasing group.



Figure 12.0

These documents will also appear in the **PURCHASE CONTRACTS / PURCHASE ORDERS** screens, but once the document has been viewed (by a user with status of “VIEWER”) in either of these screen’s it will be removed from the Documents that have Changed / New screen.

FIELD	DESCRIPTION
APPROVED?	This is when a document has been accepted (a document can only be accepted by a user with “APPROVER” status). When the document is at status “Changed” it can still be at status approved - this means that a previously approved document has recently changed. The user (if they are an “APPROVER”) has the option to go in and decline the order if they do not wish to accept the changes made.
	Declined - This is when a document has been declined (a document can only be declined by a user with “APPROVER” status). When the document is at status “Changed” it can still be at status declined. A document can be approved after they have declined the order. An email alert is automatically sent by the eSRM system to the Weir Minerals Buyer when An order is declined or approved. A facility to sort by this field will be displayed (shown as an arrow next to the column heading). How to accept or decline a order is covered previously in this user guide.
STATUS	Whether the Purchase Order has been viewed, or is changed, or is new. A facility to sort by this field will be displayed. Only a person with “VIEWER” privileges can change the status of the order.
CHANGE HISTORY	Drilldown to view Change History for Purchase Order showing (by date) summary of each change picked up by eSRM. Details shown will be Change Date, Comments , line number (specific purchasing document line number if relevant), viewed flag (has the change been viewed by the supplier), last viewed by flag (supplier login id who last view the change / document), last viewed date (latest date of the supplier login id who viewed change).
DOCUMENT NUM	Drilldown to view the Purchase Order. Document number
PRINT	Facility to print Purchase Order. Document will be displayed on screen as if printed manually and sent in the post.
DOCUMENT DATE	Document date is the document entry date.
REQUESTED DATE	Original Purchase Order Delivery Date requested
PLANNED DATE	Current Planned Delivery date of the order
CONFIRMED DATE	Confirmed Delivery date of goods.
BUYER	Buyer responsible for the Purchasing document

Change Requests

Main Menu > Change Requests

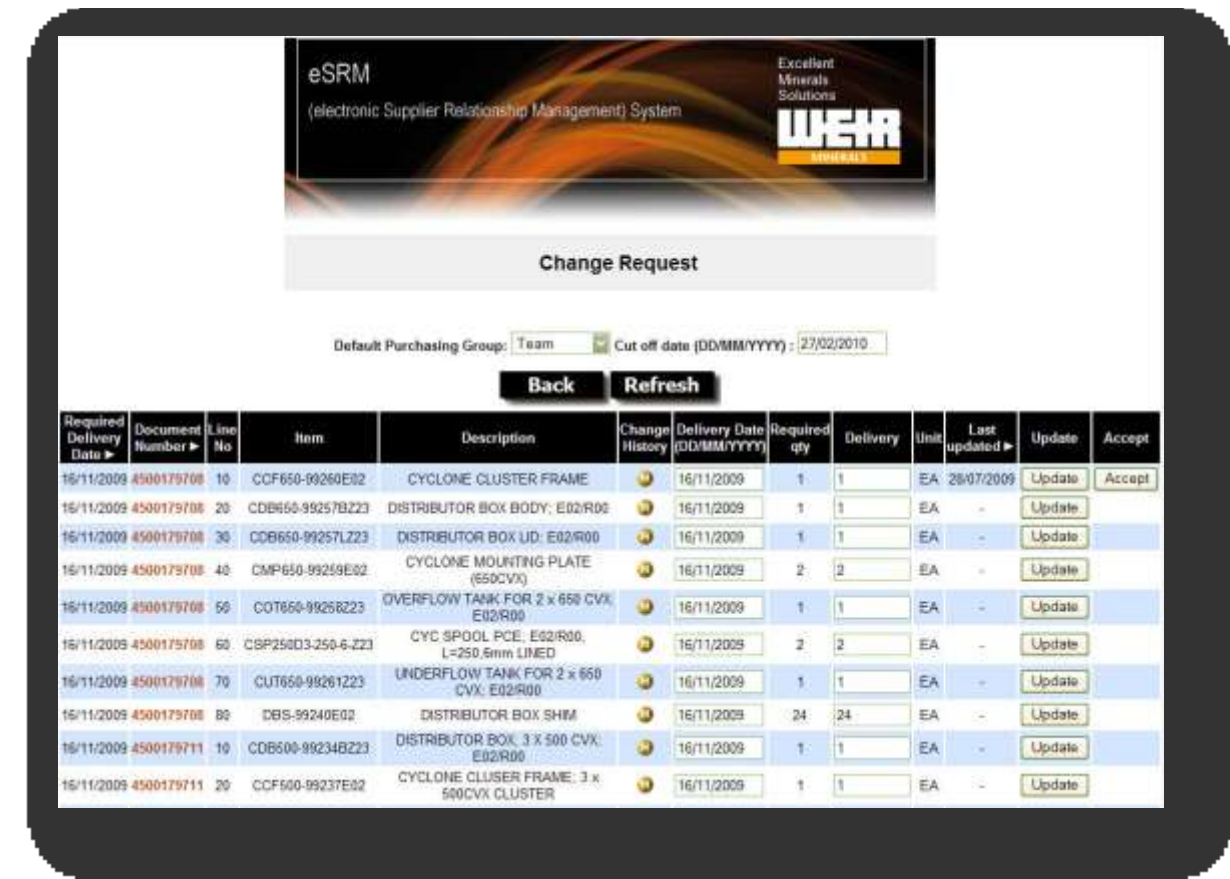
This option allows the Buyer to view / update / accept Vendor shipping information details once delivery has commenced / been arranged back to Weir Minerals. Outstanding orders (not Fully Delivered or In Transit) will be displayed on the screen with a default cut off date (in DD/MM/YY format) of current date plus one month. This can be altered by entry and using the “Refresh” button. Pressing “Back” will take you back to the Main Menu.

Details available for update are (see **Figure 13.0** for an example):

- Delivery Date
- Confirmed quantity for delivery.

Once the details have been entered press “Update” to confirm the details entered. Ensure that you press “Update” once a line has been entered otherwise this information will be lost.

To approve the details entered press “Accept” to approve the details entered. Once approved the requested changes will be passed back to the Weir Minerals SAP system automatically, and will be removed from the eSRM Shipping confirmation screen.



The screenshot shows the eSRM (electronic Supplier Relationship Management) System interface for Weir Minerals. The main heading is "Change Request". Below this, there are fields for "Default Purchasing Group" (set to "Team") and "Cut off date (DD/MM/YYYY)" (set to "27/02/2010"). There are "Back" and "Refresh" buttons. The main table displays shipping details with the following columns: Required Delivery Date, Document Number, Line No, Item, Description, Change History, Delivery Date (DD/MM/YYYY), Required qty, Delivery, Unit, Last updated, Update, and Accept. The table contains 10 rows of data, each representing a different shipping item with its respective details and actions.

Required Delivery Date	Document Number	Line No	Item	Description	Change History	Delivery Date (DD/MM/YYYY)	Required qty	Delivery	Unit	Last updated	Update	Accept
16/11/2009	4500179708	10	CCF650-99260E02	CYCLONE CLUSTER FRAME		16/11/2009	1	1	EA	28/07/2009	Update	Accept
16/11/2009	4500179708	20	CDB650-99257B223	DISTRIBUTOR BOX BODY, E02/R00		16/11/2009	1	1	EA	-	Update	
16/11/2009	4500179708	30	CDB650-99257L223	DISTRIBUTOR BOX UD, E02/R00		16/11/2009	1	1	EA	-	Update	
16/11/2009	4500179708	40	CMP650-99259E02	CYCLONE MOUNTING PLATE (550CVX)		16/11/2009	2	2	EA	-	Update	
16/11/2009	4500179708	50	COT650-99258223	OVERFLOW TANK FOR 2 x 650 CVX, E02/R00		16/11/2009	1	1	EA	-	Update	
16/11/2009	4500179708	60	CBP250D3-250-6-Z23	CYC SPOOL PCE, E02/R00, L=250.6mm LINED		16/11/2009	2	2	EA	-	Update	
16/11/2009	4500179708	70	CUT650-99261223	UNDERFLOW TANK FOR 2 x 650 CVX, E02/R00		16/11/2009	1	1	EA	-	Update	
16/11/2009	4500179708	80	DBS-99240E02	DISTRIBUTOR BOX SHM		16/11/2009	24	24	EA	-	Update	
16/11/2009	4500179711	10	CDB500-99234B223	DISTRIBUTOR BOX, 3 X 500 CVX, E02/R00		16/11/2009	1	1	EA	-	Update	
16/11/2009	4500179711	20	CCF600-99237E02	CYCLONE CLUSTER FRAME, 3 x 500CVX CLUSTER		16/11/2009	1	1	EA	-	Update	

Figure 13.0

By clicking on the “Change History” button you will be able to enquire on the amendments made to the shipping confirmations (listed by date / time / user). The latest updated date will be displayed under the “Last updated” column.

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Material Search

Main Menu > Material Search

This option allows the Buyer to search through all documents (for the selected Vendor) for a specific contract / order number, Vendor Part number or a Weir Minerals part number. A search can be filtered on any of the following (see **Figure 14.0** for an example):

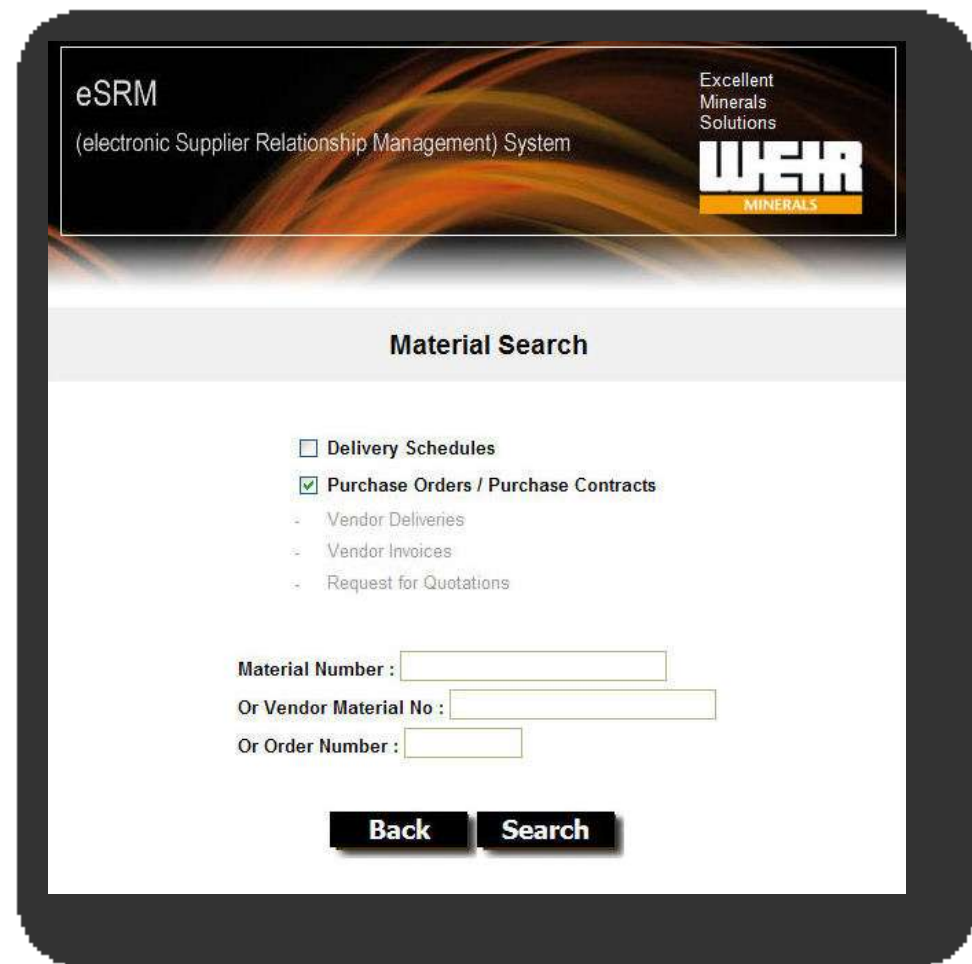


Figure 14.0

A search can be completed using one or more tick boxes.

FIELD	DESCRIPTION
MATERIAL NUMBER	Weir Minerals material number.
VENDOR MAT NUM	Supplier material number (if stored within Weir Minerals system)
ORDER / NUMBER	Weir Minerals Purchase Order Number or Purchase Contract Number.

Vendor Details

Main Menu > Vendor Details

This option allows the Buyer to view their selected Vendor details (only available if enabled within the Users profile and if the Buyer had selected to view by Vendor); displaying their name, contact details, e-mail & web address (see **Figure 15.0** for an example):



Figure 15.0

FIELD	DESCRIPTION
ADDRESS	Vendor's address as held by Weir Minerals. Postcode linked to Multimap.com directions facility if postcode can be identified.
CONTACT NAME / URL / EMAIL ADDRESS	Vendor's contact details as held by Weir Minerals.

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Contacts

Main Menu > Contacts

This option allows the Buyer to view Weir Minerals specific contact buyer details; displaying their name, details, e-mail & web address (see **Figure 16.0** for an example):

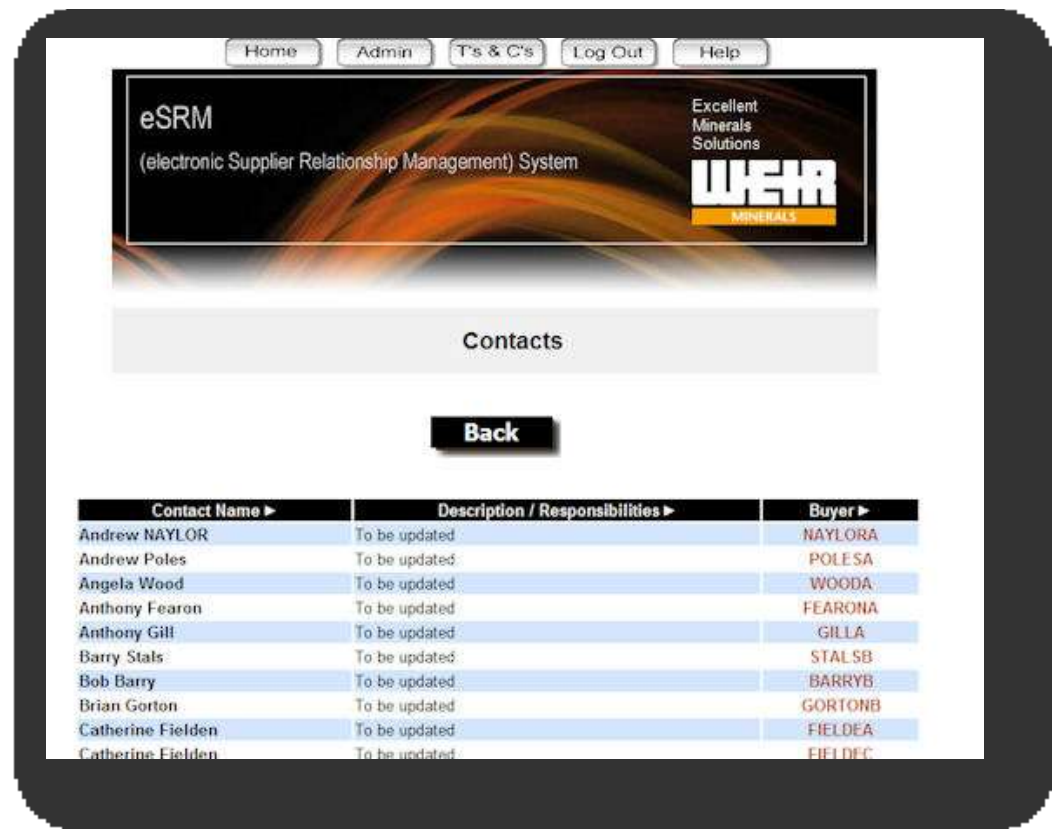


Figure 16.0

FIELD	DESCRIPTION
CONTACT NAME	Buyer's name within Weir Minerals. A facility to sort by this field will be displayed.
DESCRIPTION / RESPONSIBILITIES	Buyer's description / responsibilities. A facility to sort by this field will be displayed.
BUYER	Drilldown to view Buyer details. Details will be shown as Telephone number, Fax number, Email Address and responsibilities. .

Email Alerts

eSRM automatically sends out email alerts, there are 7 different emails which you may receive. This section cover the various email and there purpose.

If you are not receiving regular emails from Weir Minerals regarding your vendor account on eSRM please contact your vendor manager to ensure that we have the correct email address for you.

1. New Purchase Order or Request for Quotations

Figure 17.0 shows an example of a NEW purchase order or Request for Quotation, the vendor would receive this email if a new purchase order or request for quotation has been raised against them. There is a link to the eSRM system from the email and also the email is sent from the buyer who raised the document.

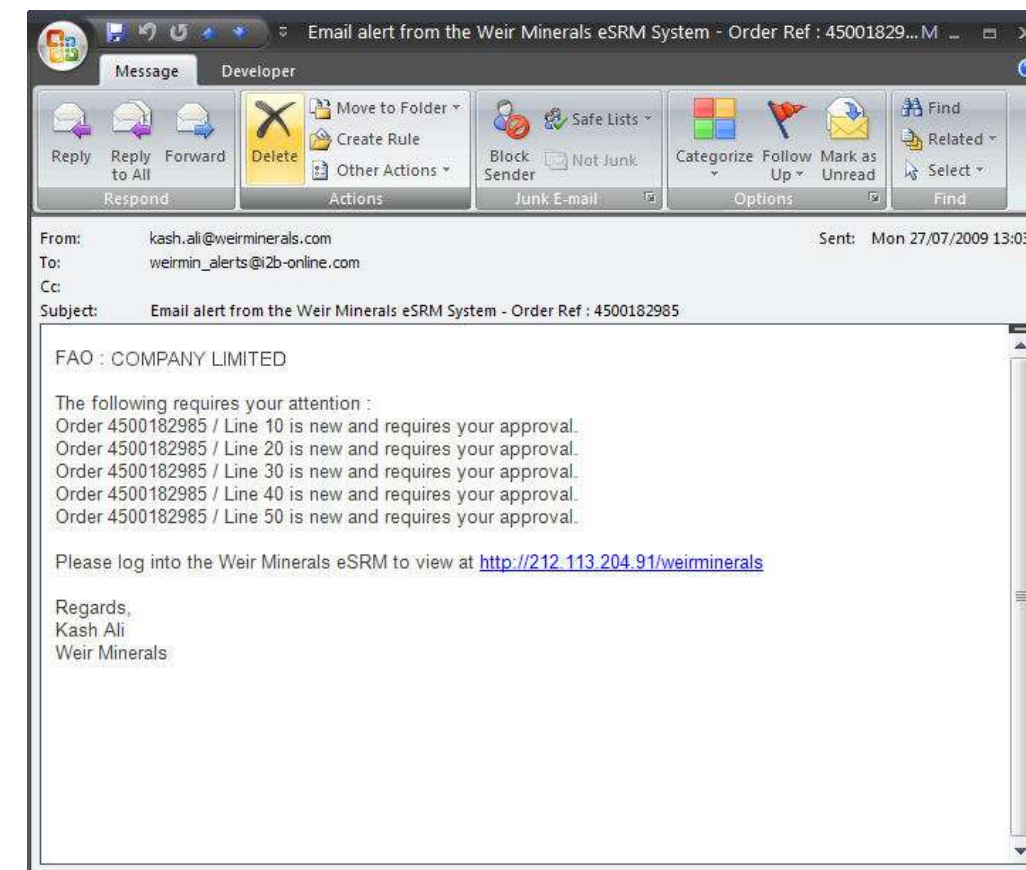


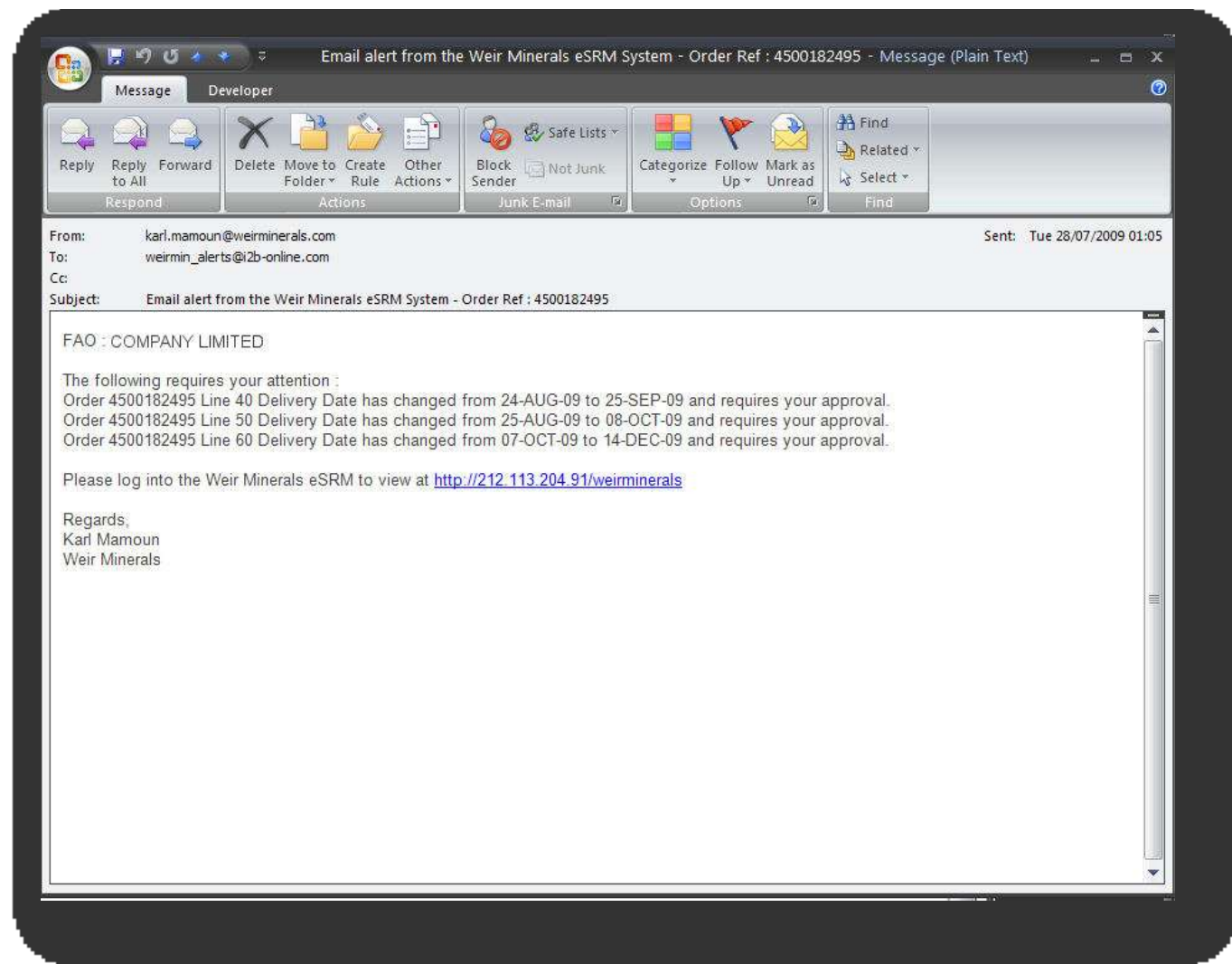
Figure 17

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Figure 18

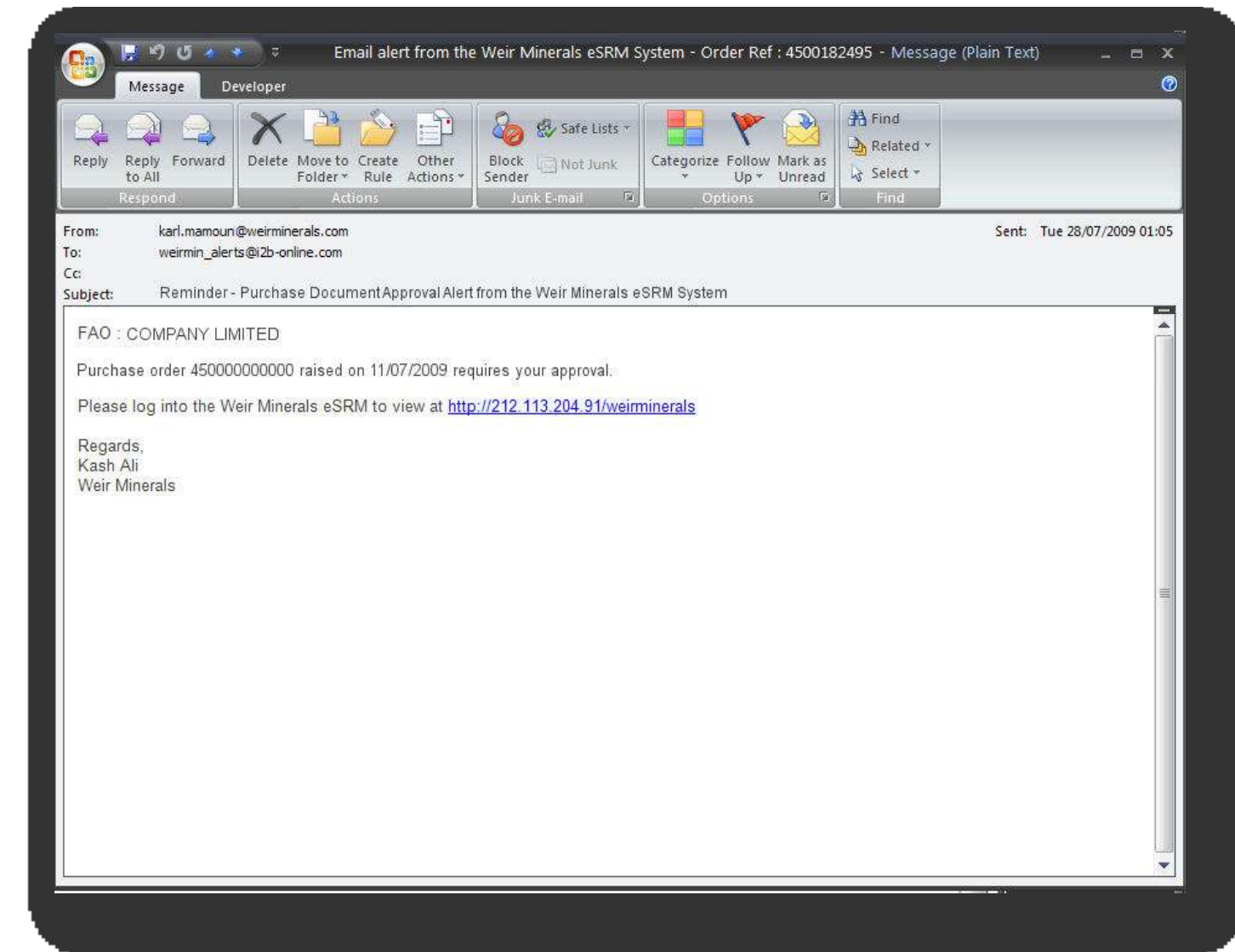
2. Changes to an existing Purchase Orders

Figure 18.0 shows an example of an email highlighting a change to a purchase order; you will only receive one email per order. The email will give an indication as to what has changed on the order, when you view the order you will be given a “one off” opportunity to decline a previously accepted order. If the order is already accepted and the changes that are highlighted do not affect your ability to deliver then the order will remain at a status of “Accepted”. If the order has been declined in the past however the changes made mean you can now deliver the goods then you can now do so at this point.



3. Reminder Emails

If an order has been raised on your account but has yet to be approved/declined by the vendor then a “Reminder” email will be issued. The emails are sent every 2 working days until the document is actioned.



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